



**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted February 2017**

This document along with the attached excerpts from recently completed 2016-2019 Strategic Plan and our existing Millennium Ten (M10) Plan represents Codman Square NDC's updated Community Investment Plan (CIP). The 2016-2019 Strategic Plan furthers and expounds upon the equity-based issues that flowed from the M10 Plan. The M10 Plan was originally completed in 2013, spearheaded by a multi-faceted stakeholder group and developed with the support of almost 1,000 community stakeholders. It serves (and still serves) as a compass for the agency and guided Codman Square NDC from 2013 to now (and beyond). We will be using both the Strategic and M10 plans as our updated CIP given the close link between both of them.

The design phase for this current 2016-2019 Strategic Plan was December 2015-December 2016. This plan was designed with a strategic planning team of the organization with Board and staff input. Codman Square NDC hired the Interaction Institute for Social Change (IISC) to facilitate this process. The organization chose IISC because of the emphasis on facilitating strategic planning with equity and inclusion lens and weaving Theory of Change and logic model frameworks into the more traditional strategic planning processes. To kick off this planning process, IISC trained the staff and Board on Theory of Change and logic models, core concepts of equity and inclusion principles. Dr. Atyia Martin, Boston's Chief Resilience Officer, participated in the February 2016 Board meeting to speak to the organization about equity work on a city and regional level. These activities informed and sharpened the Board and staff's equity focus and lens.

Key features from our 2016-2019 Strategic Plan include: 1) continued and expanded focus on Men of Color, with new pilot initiatives being launched this spring to further the housing, health and economic wellbeing of this population; 2) next stage launching of our Estate Planning Program that will support low/moderate income homeowners in developing estate documents (e.g., living wills, health care proxies, etc), while also getting more information about how to leverage their homes for their and the next generation's financial wellbeing; and 3) further development of our Rehab Lending Program in partnership with Rebuilding Together Boston to support 20 homeowners in getting low to no cost repairs to their homes. Our 2016-2019 Strategic Plan also has a deeper focus on economic development, with an emphasis on expanding our small business technical assistance work. We'll continue our comprehensive, organizational focus on anti-displacement due to gentrification, with increased focus on building our Equity Army to advocate for equitable development policies. Finally, we continue the important work we're doing at the intersection of health/sustainability and community development through our Eco-Innovation District Initiative, along with emerging work on convergence projects with hospitals, community health centers, and others in the healthcare industry.

Again, both the M10 plan as well as Codman Square NDC's internal 2016-2019 agency Strategic Plan are aligned and will be used as our CIPs. Through the strategic planning process, we've sharpened our focus and expanded the scope of our equity-based work.



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

**Section I. Community or Constituencies Served by the Organization**

Codman Square NDC's service area was selected for the M10 planning process, with a specific focus on the Talbot-Norfolk-Triangle (TNT) and Four Corners neighborhood for impact and measurement purposes and because those sub-neighborhoods have historically been underserved, though they are immediately adjacent to and just off of the heart of the more "stable" Codman Square neighborhood (together they represent about 20% of Codman Square NDC's overall service area). The broader service area is 2 square miles in Dorchester bounded by Dorchester Ave, Morrissey Blvd, Morton St, Blue Hill Ave, Geneva Ave, back to Dorchester Ave. Approximately 50,000 people live in the overall service area while 1500 residents live in the TNT and 17,000 in Four Corners. The vast majority of the population is African American/Caribbean (70%) with a growing Latino population (20%) and a small but growing White population (7%). The white population, while still small, is the fastest growing of all racial/ethnic groups in the vulnerable West of Washington St side of our service area. This data point serves as a bell weather for gentrification. Without timely and strategic intervention, Codman Square could go the same route as other Boston neighborhoods, where longtime, lower income and working class residents have been priced and pushed out as a result of market forces. Codman Square's median family income is approximately \$49,871 and our service area contains some of the lowest income census tracts in Boston. 53% of renters pay more than 35% of their income in rent. Approximately 23% of the city's brownfields sites are in our service area. About 24% of residents have less than a high school education (compared to 17% City-wide) and roughly 25% of the homicides in Boston occur in our service area.

The Codman Square Food Atlas, a study conducted on behalf of Codman Square NDC by a Harvard Kennedy School graduate student in 2014, showed that 32.8% of neighborhood residents were obese in 2012, landing Codman Square in the top ten neighborhoods with the highest rates of obesity in Massachusetts. The obesity and diabetes rates are also some of the highest in the Commonwealth, partly from an abundance of unhealthy food options, a lack of knowledge around how to prepare healthy foods, and the lack of affordable healthy food options. Furthermore, the Atlas found that certain sections of Codman Square experience "cold spots" aka food deserts, where residents face constraints in terms of access to stores selling fresh produce and healthy foods (only 1-2 small markets in immediate area). The Codman Square Food Distribution System that Codman Square NDC is setting up has the potential to become a major part in solving food equity, expanding options for healthy food in an underserved community, while also stimulating a local food economy based on social entrepreneurship.

Our focus in terms of implementation of the M10 and 2016-2019 Strategic plans is on low and moderate income people with incomes at or below 80% of the Boston median income. We will specifically target vulnerable and high impact populations such as men of color, for the income mobility and social stability strategies outlined in the Plan. Codman Square NDC's Eco-Innovation District (EID) work is focused in the TNT and the Urban Agriculture and Males of Color work we are doing are in partnership and in coordination with the Talbot Norfolk Triangle Neighborhood Association and the Boston Project Ministries (TBPM) which serves TNT. Codman Square NDC continues to be positioned to take a multi-disciplinary and network approach addressing the city's



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

most pressing disparity issues of income, racism, education, environment, and health care through its programs.

**Section 2. Involvement of Community Residents and Stakeholders**

Codman Square NDC set out to bring various community stakeholders together to develop both the M10 Initiative and our most recent 2016-2019 Strategic Plan. As convener and lead agency for the M10 Initiative, we helped to devise a plan and set of action oriented strategies for the development of the community in the coming decade. Codman Square NDC supported the M10 planning process which was guided by a 14-member Steering Committee, composed of community stakeholders from the nonprofit and local business sectors, as well as 2 key civic groups, including the TNT Neighbors United and the Codman Square Neighborhood Council. The Steering Committee guided the planning process that resulted in the M10 Plan. Codman Square NDC's Executive Director provided and continues to provide day to day supervision and guidance of the M10 Coordinator hired to support the planning process.

At least 1,000 community stakeholders, mostly residents, were engaged in the development of the M10 Plan from the Fall 2011 through the Spring 2013. This engagement took the form of participation in random surveys (about 600 completed these surveys) to gauge resident views of the neighborhood and the issues it faced. Additionally, almost 70 residents were interviewed one-on-one by Steering Committee members as a means of further fleshing out in an open-ended way resident issues and priorities. An additional 250+ residents and other stakeholders were engaged in the five focus groups that surfaced as a result of the surveys and interviews: (1) Physical Environment; (2) Safety; (3) Economic Development; (4) Youth; and (5) Connectivity and Communication. It was at the focus group level that the vision and action strategies for what should happen over the next 5-10 years in our community, as articulated in the M10 Plan, took shape. Resident and local stakeholder engagement has been a fundamental component from the very beginning at the base of the approach and work of M10. Codman Square NDC, as convener, lead agency, fundraiser and cheerleader for the M10 process understood the importance of resident engagement to the credibility of the process. We now have a large group of Community Champions and residents who are working in new collaborative ways to implement the vision created by they, themselves.

The multi-faceted M10 Steering Committee which is wholly composed of residents and local stakeholders, rolled out the M10 Plan to a packed audience of residents on March 20, 2013. We have stayed together to monitor and implement the Plan. In Spring 2012 and again in 2014, the M10 Steering Committee sponsored a series of Civic Association to Civic Association Dinners in which 10 block associations convened. The goal of this convening was to connect resident activists with each other to become better acquainted and to share information on current projects in order to stimulate more collaborative work on shared agendas and engagement in the M10 process. Additionally, from Spring 2011 to Fall 2013, over 10 block associations were invited to apply for "Early Wins" funding available through M10. The Early Wins funding was provided by the Local Initiative Support Corp (LISC), which with a consortium of funders funded Codman Square NDC to lead M10. The "Early Wins"



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

funding was designated to block groups working to advance relevant community issues. Fortunately, with the support of both LISC and the Conservation Law Foundation (CLF), we will receive additional "Early Win" funds to launch pilot programs for our Males of Color, health, and built environment work in 2017.

The planning process for the 2016-2019 Strategic Plan had several phases. First, the planning team which was composed of numerous Board and staff members was divided into two groups: *Vision, Mission, Values and Stakeholder Analysis*. One group proposed updates for the Mission and Values Statements as well as created a new Vision Statement for the organization, and solicited input and approval at an April 2016 Strategic Planning Retreat attended by the full Board and staff. The *Stakeholder Analysis Group* created an online survey, led focus groups, and conducted individual interviews to gather input interviews and survey data from external stakeholders. *The Stakeholder Analysis Group* engaged 12 faith-based organizations, 7 civic associations, 5 healthcare organizations, 4 elected officials, and a number of community members in order to extrapolate the issues that were articulated as being of particular interest to our service area. Just like with the M10 planning process, the *Stakeholder Analysis Group* found that safety, economic development, youth development, and community cohesion continue to be important themes for our community. Finally, 12 key partners were interviewed one-on-one as part of our overall effort to garner input into our past and future work and strategies. This included a number of funders both private and public and peer organizations. The concerns from our stakeholders were integrated into Codman Square NDC's recently completed 2016-2019 Strategic Plan. Staff were guided to write the goals and objectives in this plan. Individual workplans were also created to deepen alignment between each department's work and this strategic plan.

As we seek to bring the M10 and 2016-2019 Strategic Plan vision into reality, over 100 residents will continue their integral involvement. In 2016, an example of this involvement took place in the form of M10's "Together We Stand Community Series". Each of the four community forums on these topics-- "Place, Race, & Economy," "Fighting Displacement," "Public Safety," "Strength, Health & Well Being," and "Intergenerational Dialogue"-- received positive attention and participation from community stakeholders and local news outlets and were a way for Codman Square NDC to continue to engage community members and helped M10 and Codman Square NDC refine strategies around pressing community concerns. The Summer 2016 launch of the local Codman Square chapter of GirlTrek is one of the outcomes of the public safety forums where those who participated articulated their desire to address public safety and health and well-being. GirlTrek is a national walking campaign that empower women to reclaim the streets as a safe space, positively impact their health, connect, and be in sisterhood with each other in an effort to transform their community. We look forward to continuing this community building effort and to sponsoring more "Together We Stand" sessions in 2017. As well, the M10 Steering Committee will continue to operate to insure implementation and to sponsor community check-ins such as the Civic Association Dinner referenced above to monitor the progress of our Plans. Finally, for both M10 as well as Codman Square NDC's 2016-2019 Strategic Plan, a range of community stakeholders remain engaged in implementing the work. Community Champions and partners include Talbot-Norfolk-Triangle-Neighbors United, The Boston Project Ministries, the Youth



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

Jobs Hub, Four Corners Main St., ABCD, Codman Square Health Center, Codman Square Neighborhood Health Council, Boston Medical Center, Boston Alliance for Community Health, LISC, Prevention Institute, Mattapan United, ABCD Mattapan, Nuestra/Mission 180.

### **Section 3. Plan Goals**

The priority areas of the 2016-2019 Strategic Plan Seven are very much in alignment with the "7 big ideas" surfaced from the 18 month long planning and subsequent implementation of the M10 Plan. Both Plans (with added refinement from the 2016-2019 Strategic Plan) seek to: 1) minimize the most egregious aspects of gentrification and resident displacement through organizing, advocacy, economic and real estate development strategies; 2) make Codman Square a more sustainable neighborhood to improve health, economic, and environmental outcomes via our Eco-Innovation District; 3) bring together community members for collective problem solving, civic engagement, and advocacy through many strategies including the Community Café; 4) increase the economic sustainability of males of color via our Men of Color Initiative and OASIS on Ballou Urban Agriculture Project; and 5) increase capacity of small businesses through various strategies including a Business Cooperative. The 2016-2019 Strategic Plan has also identified our emerging work around community development and community health as a priority area with the goal of positively impacting the well-documented health disparities faced by Codman Square residents.

As a result of the aforementioned goals, low/moderate income residents will reduce their energy and transit costs, improve their health through reduction of greenhouse gases (pursuant to the Eco-Innovation energy retrofits and green infrastructure development), and increase their access to healthy foods and to job and career preparation (through Codman Square NDC's Men of Color and and Urban Agriculture work) so as to move up the socioeconomic ladder. The community will also benefit as people save money through provision of affordable, transit oriented housing as part of Codman Square NDC's Eco-Innovation District efforts with the Fairmount Transit Coalition and Fairmount CDC Collaborative. Community Stakeholders will be stabilized in place through foreclosure prevention efforts, have a gathering place to meet, connect, eat healthy food and get to know each other better (as through the Community Cafe). High impact populations such as males of color will be provided with life stabilizing support such as employment, pre-employment, healthcare and mentoring which has implications for reductions in crime and violence in the community. In greater detail, the key goals of our M10 Plan and Codman Square NDC's 2016-2019 Strategic Plan are; 1) Anti-Displacement, 2) Sustainability (Eco-Innovation District), 3) Economic and Commercial District Development, 4) Job and Entrepreneur Development, 5) Estate Planning, 6) Community Café, 7) Financial Opportunity Network, 8) Health, 9) Community Cohesion, and 10) Rehab Landing. See page 12 excerpted from Codman Square NDC's 2016-2019 Strategic Plan for an overview of goals, priority areas, and program activities under each.

### **Section 4. Activities to Be Undertaken**

The activities to be undertaken are partially outlined in Section 3 above as well as the impact on the community. We will pursue the activities outlined in the "Priority Area Goal Statements" in the attached 2016-2019 Strategic Plan (see pg. 15-16 of attached excerpted plan), as well as Codman



**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted February 2017**

Square NDC's base services that include affordable housing development, small business development, civic engagement and leadership development, financial literacy, foreclosure prevention and youth enrichment services. All of these base services are being integrated into the broader "big ideas" and "priority areas" flowing from the M10 Plan and the 2016-2019 Strategic Plan. The community, as a result of these efforts will be healthier and experience greater economic prosperity as a measure against socioeconomic benchmarks (e.g., level of employment, air quality, physical health, ability to self-advocate, increased homeownership, homeownership preservation, increased affordable housing and transit, etc).

**Section 5. How Success will be Measured/Evaluated**

Codman Square NDC is consistently building our capacity to effectively measure and evaluate the impact of our work on the community as a whole. We use our own internal measurement tools as well as work with partners to ensure that our strategies are aligned to have the most positive impact on those we serve. Working through the M10 Steering Committee and Codman Square NDC's Board, we regularly evaluate whether the work that we set forth in the M10 and 2016-2019 Strategic Plan and ensure this work is completed in the intended timeframe. As part of Codman Square NDC's 2016-2019 Strategic Plan, we developed an explicit Theory of Change for the long-term results that we and our community envision for Codman Square. We have set goals, timeframes, and benchmarks which will guide our evaluation of early, intermediate, and long-term accomplishments. Codman Square NDC senior staff meet regularly to review their workplans (developed from the Strategic Plan); evaluate whether the work that we set forth is completed in the intended timeframe; and ensure that activities are consistent with community strategy and vision. Finally, the M10 Steering Committee has established an Implementation Committee which will also publish regular progress and evaluative reports and make those reports available publicly, at least once a year at community meetings.

Impact of our programs is further evaluated with the support of key funders and partners including the United Way and NeighborWorks America. Codman Square NDC routinely submits impact reports to both organizations and they provide a range of evaluative services. For example, a NeighborWorks grant has helped us to complete an initial process evaluation that speaks to the potential health impacts of our OASIS on Ballou project.

Additionally, our Systems and Database Manager will help us to track and evaluate our work through our data management tools such as Salesforce and help us to stay on track with intended timeframes and goals. As a way to measure the transformative impact of our work, "Top 5 Data Points" have been identified for each department and their work. These data points help us to access the long-lasting social impact of our work in Codman Square. For example, as we measure the number of affordable, transit-oriented housing units we have created, a Top 5 Data Point would access how that housing has led to greater economic opportunity for families living in those housing units.

Finally, we have begun to look more closely at how to measure the health impact of our work. In that regard, we continue to forge and strengthen relationships with healthcare and health systems like the Boston Public Health Commission, Boston Medical Center, Health Resources in Action (our Executive



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

Director serves on their board), and others. A pending 2 year \$250,000 grant from the Build Health Challenge would help to facilitate a more robust data tracking system, using the efforts to outcomes platform for measuring program results and impacts on the target population.

**Section 6. Collaborative Efforts to Support Implementation**

A key feature of Codman Square NDC's work is that essential initiatives and program services like the M10 Plan, the Eco-Innovation District (EID), the OASIS on Ballou Urban Agricultural Project, and our Men of Color Initiative and others emerge out of collaborative efforts. M10 was and continues to be grounded in collaboration. A collaborative, multi-faceted community-based Steering Committee crafted and leads the entire process. Early on, we established an MOU that all parties executed, outlining our roles, responsibilities and approaches to decision making, fundraising and collaboration. We also have an M10 Implementation Committee that is insuring that concrete projects are carried out by a range of locally-based Community Champions and monitoring their progress. At least 100 residents have been engaged in Early Win and Implementation projects stemming from the M10 Plan. In some cases, where the interests of local stakeholders overlap, the Steering Committee has asked disparate resident/stakeholders groups who've requested funding from M10 to implement a portion of the Plan to consider working together. Through these means, we're stimulating grassroots local involvement and collaboration in the actual implementation work that is moving our community to the improved state envisioned in the Plan.

Strong partnerships and strong resident engagement have and continue to be leveraged to create real neighborhood change. Our work as part of the Fairmount CDC Collaborative, Fairmount Transit Coalition, the Fairmount Greenway Taskforce and with local residents has helped to integrate open green spaces, transit oriented development, affordable housing, and commercial hubs into cohesive and connected neighborhoods. As a result of our partnership with the Fairmount Greenway Taskforce, OASIS on Ballou, once a vacant and neglected City-owned lot, was designated as a center for urban agriculture, social cohesion, and social entrepreneurship. OASIS also works with a wider network of partners that contribute in a substantive way to the project. The Friends of Ballou is a 20-plus strong resident group that has led the planning for OASIS, ensuring that community needs and priorities are represented that as many neighbors as possible are engaged. Through their work and activism, nearly 100 residents have participated in a range of outreach, education, surveys, and engagement activities in support of OASIS on Ballou. The Urban Farm Institute provides on-site learning and training programs around successful and sustainable farming techniques to the males of color in OASIS' workforce development program. The Codman Square Health Center has partnered with OASIS to pilot a nutrition education program and to measure and maximize the health impact of Ballou.

Our Eco-Innovation District work with local residents, government agencies, non-profit partners and funders is instrumental to building green infrastructure in the Talbot Norfolk Triangle-Eco-Innovation District (TNT-EID), a 13-block area within Codman Square NDC's broader service area. More specifically, EID-focused energy retrofit activities which began in 2013, is possible as a result of our partnership with The Boston Project Ministries (TBPM), Talbot-Norfolk-Triangle-Neighbors United (TNT-NU), and the Local Initiative Support Corporation (LISC), among others, including ABCD. These



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

retrofits reduce greenhouse gas emissions, help local residents save money on their utility bills (as much as \$260 per household), and have implications for the health of residents in the TNT-EID.

As part of our Men of Color (MOC) Initiative we will continue to partner with LISC under a multi-year \$250,000 national grant (with additional implementation funds pending) made available through the Prevention Institute's Making Connections for Mental Health and Wellbeing among Men and Boys. We are developing a strategy for wealth building opportunities, affordable housing, and the reduction of toxic stress for men of color. Codman Square NDC's leadership on equitable development issues around the mental health and financial wellbeing of males of color was a key catalyst in our funding partnership with the Prevention Institute. For example, it was at Codman Square NDC's prompting that the LISC Resilient Communities/Resilient Families Initiative, of which M10 is a part, commissioned a report on men of color in Boston to better understand their differential outcomes. The 2013 report highlighted lower educational attainment and employment for men of color across Boston and made recommendations for alleviating these disparities. Codman Square NDC and the Prevention Institute work combines a community and policy based approach to address health disparities and create preventive interventions to increase community health. This initiative extends beyond Codman Square and includes the work with our M10 partners, ABCD/Mattapan United and Nuestra Comunidad in Mattapan and Roxbury. OASIS and our PI work represent only a few ways in which our organization is using community development strategies to better impact community health.

Here is a partial list of partners involved in key and fundamental ways in conceptualizing and implementing the work of M10 and Codman Square NDC's strategic plan: ABDC Dorchester, Talbot-Norfolk-Triangle Neighbors United, Codman Square Neighborhood Council, Four Corners Main Street, YMCA Dorchester, Codman Square Health Center, and the Boston Project Ministries. These partnerships and many more not included in this CIP combine with wider efforts to improve the health and well-being of the community.

**Section 7. Integration of activities/consistency with community strategy and vision**

The M10 and 2016-2019 Strategic plans are consistent with and dovetail the base service activities that Codman Square NDC has pursued including affordable and transit-oriented housing development, environmental sustainability, small business development, resident development and community self-advocacy, anti-displacement, and a focus on males of color. Both plans are also direct outcomes of resident led visioning for Codman and align perfectly with the State's Sustainable Development Principles. For example, the M10 planning process as well as a November 2013 Eco Districts Charrette attended by residents, city agency representatives, and funders generated new ideas for neighborhood sustainability-- ideas that have been captured in Codman Square NDC's M10 and Strategic Plans. Community members expressed concern for the older, inefficient housing stock in need of upgrades; the desire for more housing along the Fairmount Commuter Rail Line ; and an interest in energy saving measures. These concerns were translated into our comprehensive effort at neighborhood scale sustainability that marries deep energy retrofits, more sustainable transit-oriented development (TOD), and renewable/alternative energy measures like our Community Shared Solar Program that yield economic benefits for residents.





**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

**Section 8. Financing strategy**

A summary of Codman Square NDC's FY2017 updated CIP work as well as the anticipated cost to implement the activities of the updated CIP plan are outlined below. We are confident that with the additional funding we seek through the CITC along with the local and national financial resources that we are attracting, and as a result of our innovative, collaborative and comprehensive community development work, that we will be successful in continuing to raise adequate financial resources to achieve Plan priorities.

Codman Square NDC has experienced exponential growth over the past 15 years, from a 5-staff agency with a budget of about \$700,000 to an organization with over 25 staff and a budget in excess of \$2.6mill. We have been successful in sustaining this growth due to our experience in the real estate development area and our ability to effectively manage and grow our funding base. Each year we have been successful in meeting our fundraising goals and have attracted new resources at the local, state, national, corporate and private level due in large part to the innovative and broad-scale impactful work we are doing in transit oriented development, sustainability, community engagement and collaboration as set forth in the M10 Plan and the 2016-2019 CSNDC Strategic Plan.

Over the last 3 years, we have used the CITC to leverage major new individual and corporate donors including CITC gifts from \$10K-50K. The availability of the CITC was a major factor in our ability to raise almost \$250,000 for our September 2016 35th Anniversary Gala Celebration. Through the CITC and our 35th Anniversary Gala, we greatly increased our donor base and potential CITC donors in 2016. As we become more adept at using the CITC to attract new major funders, we are confident that we can attract the full \$300,000 in CITC donations in 2017 to support implementation of our comprehensive initiatives.

While our core work remains development of affordable housing, over the last 3-5 years, Codman Square NDC has increasingly diversified its revenue base, though real estate developer fees remain an important source of funding. The main examples of funding base diversification are the M10 project funded by an on-going grant by a consortium of funders led by LISC (over \$700K in the last 4 years); Barr Foundation funding for the Eco-Innovation District (\$600K over 4 years); Enterprise Section funding for comprehensive community development including the Eco-Innovation District and OASIS on Ballou (\$300K over 4 years); Prevention Institute Funding (\$250K over 2 years) for our Men of Color Initiative; and the major CSNDC 35th Anniversary Gala fund-raising campaign using State Community Investment Tax Credit—we raised almost \$250,000 through this event. An over-arching theme in all these cases is that Codman Square NDC can best carry out its mission by serving as a catalyst and stimulator of community support initiatives, (in addition to a direct developer and service provider), and that new alliances are key to this. Of course, in all these efforts, what sets Codman Square NDC apart is our ability to carry out transformative and complex development projects which bring major new investment to the neighborhood and spur future public and private activity. Real estate activity is increasingly coordinated and integrally integrated into these other initiatives so that production of new



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

affordable housing is one among several goals of our development projects.

Through Codman Square NDC's operating budget which includes numerous funding sources from real estate developer fees, private and corporate grants and a solid fundraising track record over the years, the following base service activities will also be pursued as part of M10 and 2016-2019 CSNDC Strategic Plan implementation:

*Summary of Codman Square NDC FY 2017 Budget –*

Total Revenue	\$2,601,969
Total Expenses	\$2,596,368
Net Income	\$ 5601

Codman Square NDC has significant experience in garnering and managing State and federal resources (e.g., LIHTC, HOME, Sect 4 etc) for RE development and operating purpose.

*Summary of CIP Implementation Budget 2017\**

M10 and Strategic Plan Projects	2017 Budget	Revenues Raised as of Jan 2017	Source
1. Eco-Innovation District	\$200,000	\$80,000	Barr, Enterprise
2. OASIS On Ballou	\$100,000	\$33,500	Enterprise, Eastern Bank, Stop&Shop
3. Men of Color Initiative	\$ 75,000	\$ 50,000	Prevention Institute
4. Small Business Dev & Business Cooperative & Job Training	\$ 100,000	\$ 40,000	Santander, Riley
5. Anti-Displacement Work/Keeping Codman Square Affordable	\$ 45,000	\$ 30,000	CSNDC Developer fees, United Way
7. Community Café	\$5000	\$0	M10 Implementation Fund
8. Estate Planning	\$20,000	\$5,000	Santander
9. Rehab Lending	\$20,000	\$5,000	CSNDC Developer fees
10. Health/Community Development	\$80,000	\$60,000	Build Health (pending)
Subtotal	\$645,000	\$303,500	



**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted February 2017**

Other M10 Budget Needs			
Implementation Projects	\$ 20,000	\$ 20,000	M10 Implem Fund
Mill10 Staffing and Operating	\$100,000	\$100,000	LISC Funder
Other Mill10 Support Needs	\$ 50,000	\$35,000	NeighborWorks, Foundations
Subtotal Other M10 Needs	\$170,000	\$155,000	
GRAND TOTAL ALL NEEDS	\$815,000	\$458,500	
REVENUE GAP	\$356,500	Funds Raised by_ Dec 31, 2017	
Gap Filling Resources*		\$300,000	CITC Proceeds+
Fundraising		\$60,000	Various Sources -

+Requesting \$150,000 in Community Investment Tax Credits

\*Sources Examples: Merck, Enterprise, The Boston Foundation, NeighborWorks America, TD Bank, etc, all of whom have supported our M10 and emerging Strategic Planning work.

### **Section 9. History, Track Record and Sustainable Development**

Since it was established in 1981, Codman Square NDC has worked in partnership with neighbors and neighborhood institutions to rebuild a community that was nearly devastated by recurring cycles of speculation, arson, disinvestment, and abandonment. For over 35 years, Codman Square NDC's comprehensive community development work has integrated affordable housing, economic development, and community organizing in ways that are increasingly incorporate all of the State's Sustainable Development Principles to create and expand economic opportunity for low and moderate income residents in Codman Square.

Codman Square NDC, over the past 20 years, and most particularly in the past 5 years, has become a community development leader in the sustainability arena as evidenced by the launching of several new initiatives since 2012 that are squarely focused on improving the environmental health and energy infrastructure of the community.

Over the last 4 or so years, we've seen signs of gentrification and displacement and fear that our neighborhood is transitioning into an increasingly unaffordable, high priced community. These alarming trends were the subject of two gentrification susceptibility studies of our service area that we commissioned in 2014 with the support of The Boston Foundation and the Boston University Urban Symposium. Our very recently completed 2016-2019 Strategic Plan was therefore laser focused on equity issues and equitable development.

Codman Square NDC's equitable development focus integrates affordable housing development, equitable economic development and sustainability principles and practices, as well as community organizing and mobilization. Everything we do is viewed through the lens of: (a) How will it impact the



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

environment? ; (b) How does the sustainability work align with economic development?; (c) Will the focus on sustainability impact our low and moderate income constituents' financial well-being (their pocket books)? Will it impact their health?; (d) How do we insure that there is economic and health benefits for vulnerable populations such as men of color (MOC)? (d) How do we increase Minority Business Enterprise (MBE) utilization in all the work we do on the sustainability, real estate development, and economic development sides?; and (e) How do we stimulate locally-based micro-enterprises through this work? Viewing the work through these lenses and answering these questions helps keep these sustainable development principles relevant to the population and community that we serve.

Examples of our sustainable development/equity and economic development focused work includes:

1. **OASIS on Ballou Urban Agriculture Project:** We've been designated developer of a City-owned, 20,000+ sq ft vacant lot on Ballou Ave in Dorchester, immediately adjacent to the Fairmount Commuter Rail Line. In 2015, we launched the site as an urban agriculture site with men of color who are re-entering from the criminal justice system as managers of all aspect of farm production. With the support of the Urban Farm Institute, these men participated in Master Farmer training. Our first two years of operation saw the growth of almost 2,000 lbs of healthy, fresh, culturally appropriate produce. This past year, in conjunction with the Codman Square Health Center (CSHC), we launched a healthy food preparation class in the kitchen of one of our housing development's community rooms, using the produce from Ballou to demonstrate healthy cooking. We hope to expand this effort in 2017 through a partnership with Boston Medical Center, CSHC, Boston Alliance for Community Health and Boston Public Health Commission to increase the amount of men involved in expanded urban agriculture sites that will produce 10,000 lbs of produce. See more details on this effort elsewhere in #6, below.
2. **The Talbot Norfolk Triangle (TNT) Eco-Innovation District Initiative (EID):** This initiative is focused on: (a) Energy Retrofits (we've helped facilitate the retrofit of almost 50% of the 525 housing units in the TNT EID); (b) Local Energy Generation (we've launched a Community Shared Solar Program. 400 housing units will have solar panels installed on them. The excess energy will be virtual net metered to low income TNT EID residents to reduce their energy costs and incentivize them to do deeper energy retrofits on their homes; (c) Green Infrastructure development. Resident stakeholders are actively engaged in implementing opportunities to green neighborhood through urban agriculture, community gardens, and rain water reuse. 30 rain barrels were installed to conserve rain water and save money by reducing storm water runoff); and (d) Transit-oriented mixed used development (see Fairmount CDC Collaborative description immediately below for track record on this sustainability work).
3. **The Fairmount CDC Collaborative:** In collaboration with 2 other CDCs, we are focused on developing over 1,500 units of affordable mixed-use transit oriented housing developments within a ½ mile radius of the new and existing stops on the Fairmount commuter rail line. Over 900 of those units have been developed, with about 400 units in the pipeline over the next 3 years. Codman Square NDC has contributed at least 400 units to this count over the past decade.



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

4. **The Fairmount Transit Coalition:** This is a ground-up grassroots coalition of over 12 groups fighting for 4 new stops on the Fairmount rail line (3 already installed), fair fares and improved service including more frequent headways.
5. **The Fairmount Greenway Task Force:** The Task Force is a collection of over 10 groups working to develop green and passive recreational spaces along the Fairmount line. Codman Square NDC's Oasis on Ballou Urban Agriculture site is one of the Fairmount Greenway sites.
6. **Health and Community Development:** We are increasingly working at the intersection of health and community development. Currently, we are partnering with Boston Medical Center (BMC), the Codman Square Health Center (CSHC), the Boston Public Health Commission, and the Boston Alliance for Community Health to submit a grant focused on expansion of our Ballou Urban Agriculture project to an additional site on the roof of the Boston Medical Center and to expand the number of Men of Color engaged in all aspects of food production at these sites. The estimated 10,000 lbs of food expected to be grown by the men will be distributed to BMC and CSHC patients to improve their health and to measure the impact of increased access to fresh produce on the men and the patients engaged.

Codman Square NDC has served as a leader, catalyst and convener of all of the efforts described above. With our partners, we've leveraged well in excess of \$500 million in public and private funds to support this and other sustainability work. Codman Square NDC's history and track record clearly is and continues to be aligned with the Commonwealth of Massachusetts Sustainable Development Principles as further described below.

*Codman Square NDC's Alignment with Sustainable Development Principles Related to Concentrate Development & Mix Uses/Provide Transportation Choice/Expand Housing Opportunities and Plan Regionally*

Affordable housing is at the core of Codman Square NDC's work while economic development and community organizing are also part our specialty and strength. We have developed over 1,400 units of housing in our 35 year history. Many of our real estate developments are mixed-used projects with affordable housing units at the top and commercial real estate space at the bottom. Through our partnership with the Fairmount CDC Collaborative, we are attracting new businesses and jobs through 120,000 sf of new commercial space completed or in pre-development. New transit-oriented-development is creating affordable and mixed-income, energy efficient homes for over 1600 individuals in walking distance to stations in the Fairmount Corridor. We take an integrated approach to sustainable development by mobilizing our base. Through resident organizing campaigns, Codman Square NDC worked with three other CDCs, local elected officials and local community groups, along with hundreds of community residents and businesses to successfully advocate for and garner over \$200 mill in State Resources to improve transit service and build three new stops on the Fairmount/Indigo Commuter Rail line in our service area. Finally, in response to the foreclosure crisis that impacted Dorchester more than any other neighborhood in Boston, Codman Square NDC successfully worked to prevent the foreclosure of more than 500 housing units in the past 5 years.



**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted February 2017**

*CSNDC's Alignment with Sustainable Development Principles Related to Making Efficient Decisions*

Codman Square NDC has a history of convening local stakeholders to identify and address community development issues in accordance with smart growth and environmental stewardship. In its broker, convener, and catalyst role Codman Square NDC has since 1989 been at the forefront in coalescing the community to develop comprehensive community plans including the 1989-1990 Action Agenda, the 1999-2000 Millennium Plan, the 2013 M10 Plan, and most recently the 2016-2019 Codman Square NDC Strategic Plan. Each of these processes engaged hundreds of community residents and led to the creation and implementation of comprehensive community development strategies that integrate neighborhood scale sustainability, affordable transit-oriented housing; transit equity; local energy generation, green infrastructure development, energy retrofit and safety, community mobilization and advocacy; while also creating alternative economic models, like the Ballou Urban Agriculture project.

Our emerging work at the intersection of health and community development is increasingly engaging key leaders in the healthcare field to support us in cross-sector work, planning, visioning and decision making. This work is also being leveraged to build partnership around how to impact the many health disparities in our community and how to better align our work to impact the social determinants of health. Read more about this in sections 9(1) and 9(6).

*CSNDC's Alignment with Sustainable Development Principles Related to Protecting Land and Ecosystems, Using Natural Resources Wisely, and Promoting Clean Energy*

The Eco-Innovation District (EID) emerged in 2013 out of residents' vision through the M10 Plan to develop a sustainable, healthy urban "ecosystem" that serves area residents, improves their quality of life, and promotes health and wellness. Subsequently, new green space and public realm infrastructure projects such as rain gardens, street trees, green bus stop roofs, destination signage and traffic calming measures have been enhancing air quality and public safety, improving the built environment and public health, and creating new opportunities for recreation, civic engagement, and outdoor activity. In 2016, the EID was named one of only two neighborhoods in Boston to serve as pilot neighborhoods for the city's Slow Streets Program, an effort to better design the physical landscape to improve safety and reduce pedestrian and bicyclist accidents.

Codman Square NDC and its partners have transformed three vacant lots into public parks and community gardens and installed over 30 rain barrels (with approximately 30 more to come) to mitigate issues related to storm water runoff. In partnership with the Fairmount Greenway Taskforce, the MBTA, the Environmental Protection Agency (EPA), and the City of Boston, Codman Square NDC has also piloted installation of three green roofs on local bus shelters along the Fairmount Line in the Eco-Innovation District to create a highly visible sustainability demonstration and public education



**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted February 2017**

opportunity. The EID is creating a new model for sustainable and comprehensive equitable community development in low-income urban neighborhoods. The EID is also working in tandem with the other Codman Square NDC efforts to bring attention to the community and its close proximity to the Fairmount Commuter Rail Line and to draw economic opportunities, business, and investments to the area. We have made great progress in the EID including the near completion of 44 new units of transit-oriented affordable housing (as part of our Whittier-Lyndhurst-Washington project), retrofitting 50% of the housing units, creating local energy generation through our Community Shared Solar Program, and implementing health and mobility measures.

Since 2008, Codman Square NDC has been collaborating with the Fairmount Greenway Task Force to transform vacant lots along the Fairmount/Indigo Commuter Rail Line into a network of safe and attractive community green space that promote healthy eating, active living, and vibrant communities. The Greenway is connecting three major neighborhoods within the Fairmount Corridor through a 9.2 mile “neighborway” that closely follows the Fairmount/Indigo Commuter Rail Line. The Greenway will promote safe walking and bicycling to connect residents, commuters, shoppers, and visitors to new and existing parks, business districts, and historic sites. There are several open space pilot projects for the Fairmount Greenway that are currently underway along the corridor. Codman Square NDC’s urban farm, OASIS on Ballou is one of those open air pilots along the Greenway being transformed into a space for urban agriculture and social enterprise. OASIS on Ballou was only the second urban farm in the City of Boston to be approved under the City’s new comprehensive farm review process. Since its pilot season, OASIS now grows more than 1000 lbs/yr of food that is distributed to community members to address healthy food access. We plan on growing 10 times as much food via a pending partnership with Boston Medical Center and other partners, as described above.

***CSNDC’s Alignment with Sustainable Development Principles Related to Increasing Job and Business Opportunities***

With the growing income divide in Boston as documented in the 2013 Federal Reserve Report and Codman Square NDC’s growing concern about gentrification, rapidly increasing housing prices, and displacement in our service area as outlined in our “Mapping Neighborhood Change” gentrification susceptibility analysis completed by the Boston University Urban Symposium in 2014, we have launched a “Keeping Codman Square Affordable” (KCSA) campaign. Each of our agency departments are engaged in the KCSA campaign, a multi prong strategy to address the threat of displacement in a targeted and impactful way.

Part of our KCSA campaign is the strategic approach to the creation of assets and wealth among neighborhood stakeholders. Our Economic Development department is focused on building up our job referral and placement process and small business development program. With the support of a multi-year Riley Grant via our involvement in the Fairmount/Indigo CDC Collaborative (FICC), our Economic Development and Community Organizing departments are integrally involved in job search, referral, and placement of job seekers through the Fairmount Jobs Corridor Program. With the support of our



**Codman Square Neighborhood Development Corporation**  
**Updated Community Investment Plan**  
**Submitted February 2017**

FICC partner, Dorchester Bay Economic Development Corporation, who supports our new Economic Development Jobs Specialist, we launched the Jobs Corridor Program this past year. The goal is to place at least 150 residents in jobs along the Fairmount corridor. In conjunction with Boston Career Link, the Newmarket Business Association, and Dudley Street Neighborhood Initiative, we've already referred dozens of people to job and training opportunities.

Our small business development program, Dot-Biz, had a successful first year focusing on strengthening the financial position of local and aspiring merchants by providing them with education and technical assistance to ensure long-term sustainability, job creation, and growth. To further bolster the small businesses in our community, we have begun to rebrand Codman Square as the Caribbean Corridor bringing attention to the rich diversity of Afro-Caribbean vendors and the array of services they provide to the Codman Square community. Two examples of success stories from the Dot-Biz program and our small business technical assistance include the launch of Codman Square's first Community Café known as the Next Step Soul Food Café and the launch of Thumbprint Realty. Both businesses are growing fixtures in the community as they provide healthier food options and create jobs respectively. Owners of both businesses received extensive support, education, and training from CSNDC's small business programs.

*CSNDC's Alignment with Sustainable Development Principles Related to Advancing Equity*

Codman Square NDC has been a leader on equitable development issues, with an increasing focus on men of color: a high impact, yet oft overlooked and vulnerable population. Our focus on this population 3-4 years ago, pre-dated the Black Lives Matter movement, which we appreciate. Of particular interest to CSNDC is addressing the mental health and financial wellbeing of males of color through our Men of Color/Men of Action Initiative (MOC/MOA). In 2013, at CSNDC's prompting, the Local Initiative Support Corporation (LISC) Resilient Communities/Resilient Families Initiative, of which our Millennium Ten Community Planning Initiative is a part, commissioned a report on men of color in Boston to better understand their differential outcomes. The report highlighted lower educational attainment and employment for MOC across Boston. CSNDC has already started to respond to these inequities. The Urban Farm Institute and the New Start (Re-entry) Project were both instrumental in helping CSNDC recruit and train 4 males of color in urban farming techniques and business management skills associated with our Ballou Urban Agriculture site in 2015. With the aid of LISC, a multi-year \$100,000/year competitive national grant from the Prevention Institute was awarded to CSNDC's Men of Color Initiative, to support Black and Latino men; build the capacity of residents and programs that are already doing this work; and provide funding to expand initiatives that provide career, health, and peer support services for males of color. Through these means we are striving for racial equity for males of color in Codman Square and striving for mental and physical wellbeing opportunities for Black and Latino males, particularly those who are re-entry citizens.

Increasingly, we are positioning ourselves to use our sustainable development work to address the well-documented health disparities that impact Codman Square residents. Many of Codman Square





**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted February 2017**

NDC's initiatives including OASIS on Ballou- our urban agricultural project; a 3 year Partnership to Improve Community Health (PICH) grant from the Boston Public Health Commission (BPHC) to expand our smoke-free housing policy and promote active living; our work around environmentally sustainable neighborhoods through our Eco-Innovation District (EID); our Males of Color Initiative around economic wellbeing and mental health; and our partnership with the Boston Alliance for Community Health (BACH) through its Aligning Health Equity and Development (AHEAD) initiative are all working to address community health needs. These initiatives have pushed us to think more intentionally about how Codman Square NDC can better align our interventions and efforts to make the greatest impact on the wellbeing of our residents.

**Attachments to Updated CIP**

Attached to this proposal are: (1) Excerpts from Codman Square NDC's 2016-2019 Strategic Plan